People Manager User Guide (V 2.0)

0.0 Introduction

This is the User Guide for iTrent People Manager. People Manager is a web based tool which allows managers at UEL to view some of the personal and organisational details for their reportees. It also gives managers access to a suite of reports covering areas such as headcount and holiday/sickness absence, to assist with day to day management.

Self Service also interfaces with the HR database, so this enables the online authorisation of annual leave for reportees via People Manager, and access to an 'Out of Office' calendar for your staff.

1.0 Important Security Advice

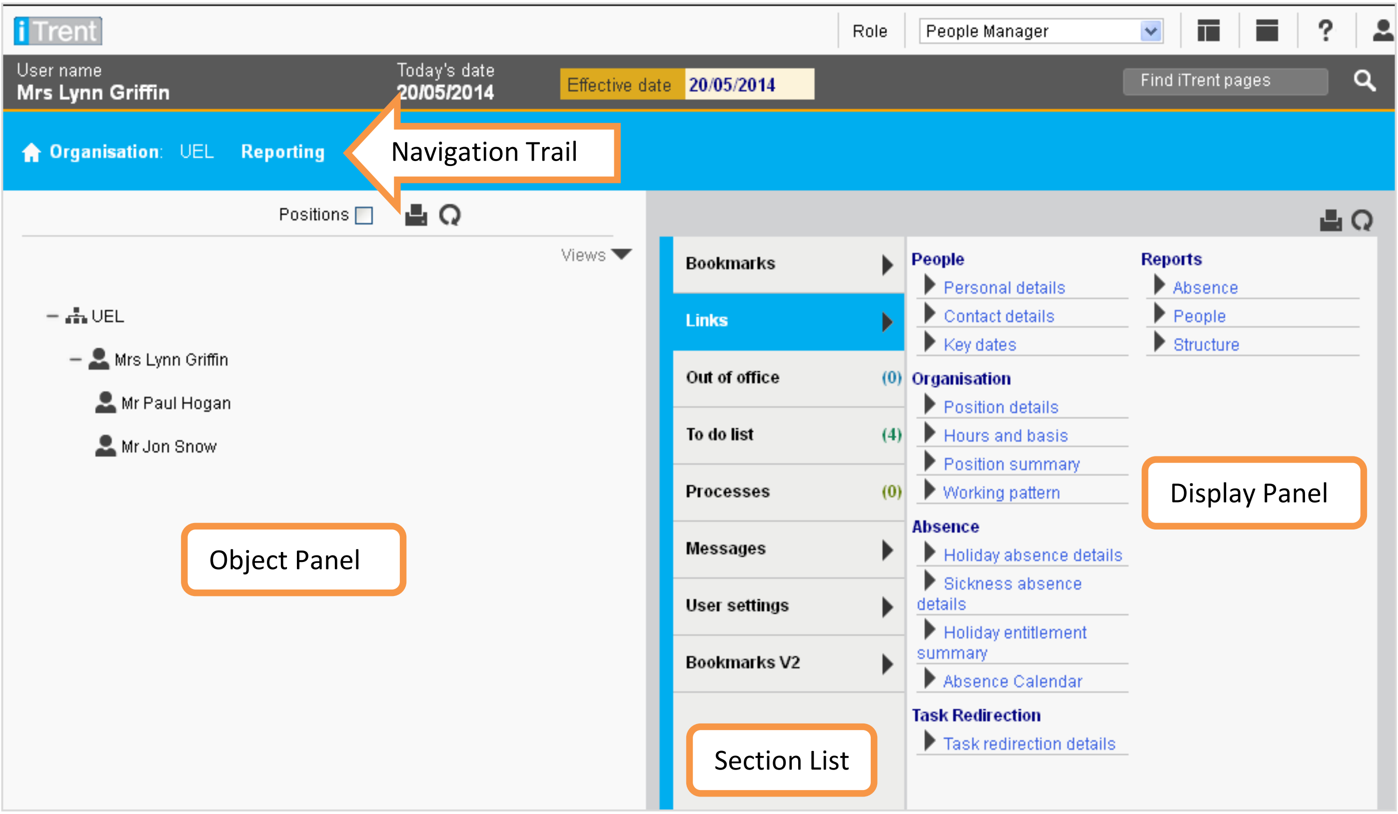
People Manager gives access to some sensitive information. By adhering to UEL's Computer Use Policy and Network Security Policy you will ensure the safety of this sensitive data. However, it is worth reiterating that you should always lock your computer when leaving it unattended and never disclose your password to another user. It is best practice to log out of People Manager each time you have finished using it.

2.0 Access to People Manager

To connect to People Manager go to https://itrent.uel.ac.uk/trentpr_web/wrd/run/etadm001gf.open and log in using your usual network ID and password. If you encounter any problems logging on, please contact the HR Systems Team on the Trent Admin email address or call Nicola Flynn on ext 4366 or Chris Falzarano on ext 6328.

3.0 Home Page
4.0 Authorising Annual Leave/Holiday
5.0 Viewing holiday and sickness
6.0 Task redirection
7.0 Reporting

3.0 Home Page



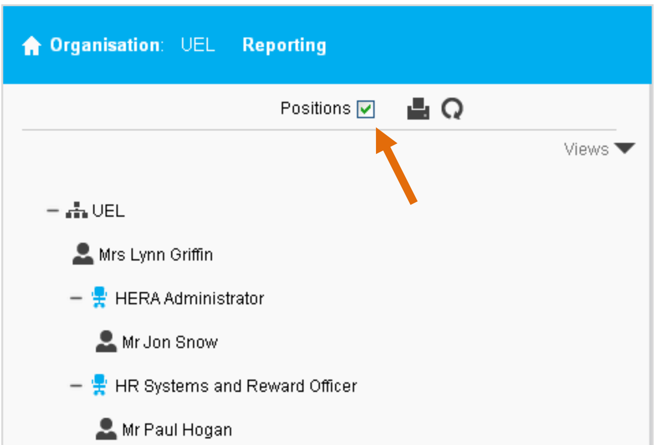
Object Panel - displays a list of your reportees
Display Panel - provides access to all the forms and reports which are available to you
Section list - provides access to the processes and functions in People Manager
Navigation Trial - displays the path you have taken through People Manager

3.1 Object Panel

When you first log into People Manger, the Object Panel displays a list of your reportees.

People view – list you and your reportees by name

Position view – list your reportees by name then job title



These records can be highlighted individually, globally, or as a custom combination. This will determine which reportees' records are shown when the relevant forms are selected in the Display Panel. Multiple records can be selected and used for viewing calendars.

Hold down the Ctrl button when selecting multiple employees

3.2 Section Panel

Bookmarks	Bookmarks are 'favourite' People Manager pages. As the system is set up with a very simplistic view, all users are already provided with a selection of Links (see below) which provide access to all of the data available. It is not anticipated that bookmarks will be required for People Manager access.
Links	These are a list of links which can be used to access the forms and reports on the database which relate to the reportee selected in the Object Panel.
Out of Office	Lists reportees who are identified as being out of the office, e.g. absences due to holiday/sickness/maternity/paternity or UEL learning events.
To Do List	Display's any outstanding tasks which require your attention, including holiday requests and holiday amendments.
Processes	Lists all background processes which are running, or have been completed in the last 24 hours. This includes links to reports which have been run.
Messages	Displays any current "System Alert" or "Message of the Day" text. These are messages sent from HR Services which may relate to usage of People Manager.
User Settings	Displays the default preferences set by the system administrators, and allows you to adjust some of the options.

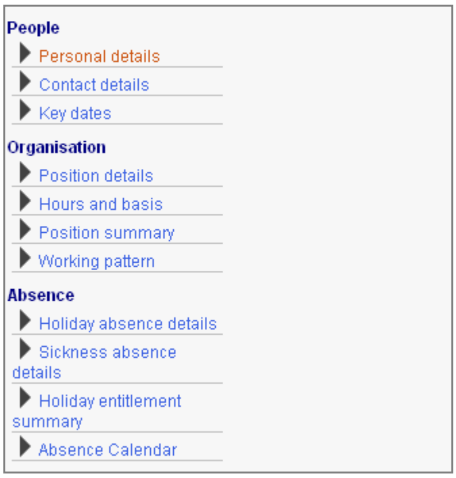
3.3 The Navigation Trail

The Navigation trail is displayed on all screens and shows the path to your position in People Manager. You can also click on any item within the trail to return to that point in the system.

To return directly to the Home Page from any screen within People Manager, simply click on the home icon at the far left of the navigation path, or the home button which appears within the display panel.

3.4 Display Panel

You can view various details for each of your staff using the links in the display panel. These links are sorted into the groups: **People**, **Organisation** and **Absence**. Start by selecting the reportee required from the object panel on the left, and then select the form that is required from the links in the display panel.



3.4.1 People Forms

Form	Fields Available
Personal Details	Surname, Forenames, Title, Preferred Name, Gender, Previous Surname, Organisation Start Date
Contact Details	Any internal or external contact information which is available. E.g. Internal Telephone Extension, UEL Mobile, Home Telephone etc.
Key Dates	Expected Retirement Date, Organisation Start Date, Length of Service with UEL, and any additional Reckonable Service Dates.

3.4.2 Effective Date

Forms marked with an asterisk indicate that these are date effective and you have the ability to view historical data, as well as future changes which have already been processed by HR Services.

When viewing forms that are date effective, the system will prompt for the date to be confirmed, or changed to the date required.

The date will default to the current day. This should either be confirmed (by pressing return, or by clicking on “Confirm effective date”), or a new one entered. To change the date simply type it into the field and confirm it as per above.

3.4.3 Organisation Forms

Form	Fields Available
Position Details *	Job Title, Occupancy Start, Location, Reporting Unit and Reporting Manager.
Hours & Basis *	Contractual and FTE Hours, Annual Week Worked, Category, Basis and Type (examples below). **Category** – Teaching, Support, Hourly Paid etc. **Basis** – Full Time, Part Time, Full Time TTO (Term Time Only) etc. **Type** – Permanent, FTC, Other etc.
Position Summary*	Groups many of the position details on one form. This includes important information relating to fixed term staff, such as Expected Occupancy End Date.
Working Pattern	Working patterns indicate the number of hours typically worked by each member of staff on each day. These are used to calculate deductions in holiday entitlement, and hours/days lost to sickness absence.

3.4.4 Absence Forms

Form	Fields Available
Holiday Absence Details	Holiday start and end dates, with details for full and part day absences. The holiday balances can also be viewed on this form.
Sickness Absence Details	Sickness absence start, end and expected end dates, as well as the sickness absence reason.
Holiday Entitlement Summary	A summary of the Length of Service and Leave Entitlement by year, as well as a list of holiday dates for the period. Each set of holiday dates booked has a corresponding duration calculated, which in turn provides a reducing leave balance for the year.
Absence Calendar	This provides a calendar style view of absences for an individual reportee, or multiple reportees simultaneously. The absence types displayed on the calendar can be selected using the check boxes available e.g. Bank Holidays, Company Holidays, Annual Leave, Sickness Absence, UEL Learning Activities, Maternity/Paternity and Adoption Leave.

4.0 Authorising Annual Leave/Holiday

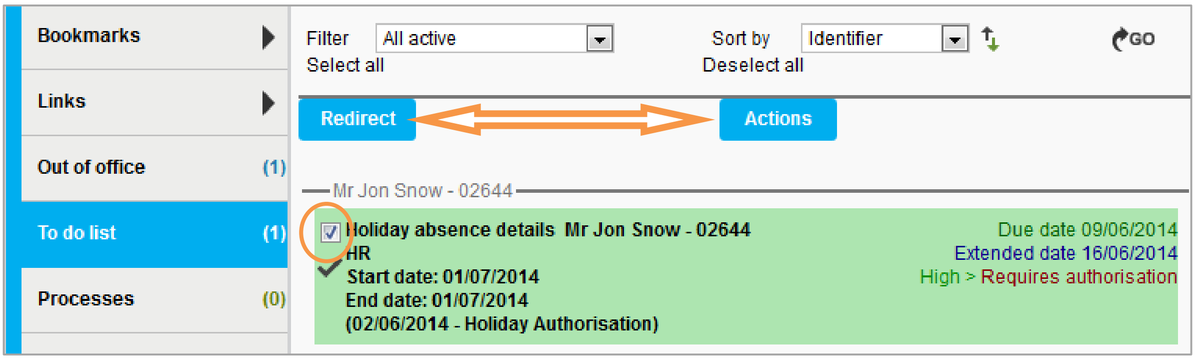
Authorisation on Annual Leave/Holiday will appear in your ‘To do list’ on the homepage.

When a reportee requests leave via Employee Self Service, a task will be sent to you to action. You will receive an email alerting you to the new task. Contained in the email is a link to access the individual request for leave; when using the email link, no further People Manager functionality is available.

Alternately you can log into People Manager and to obtain further information, or to process multiple tasks.

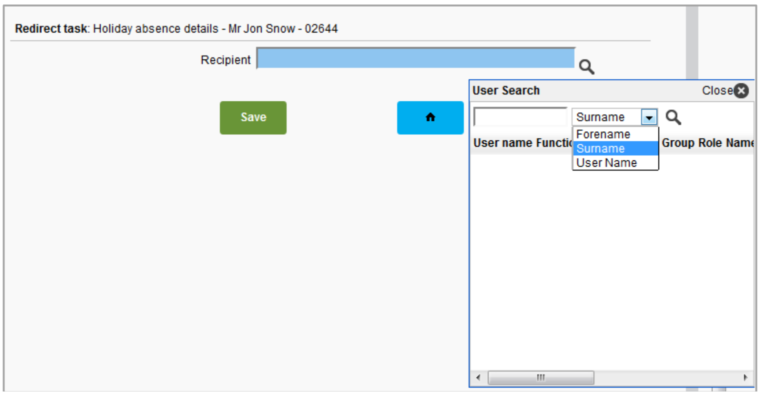
Below is an example of an annual leave/holiday requests in a manager's 'To do list':

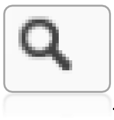
By selecting the annual leave by ticking the box the Redirect or Actions option appear.



Redirect

Redirect Task – Allows you to redirect the task to another user of People Manager for processing.





The magnifying glass in People Manger is the search icon. By clicking on it a search box will appear.

Actions

Action task - Selecting ‘Actions’ will display a pop up menu with three options:

Authorised – will authorise the leave and create a holiday record in the HR database. An email will also be sent to the reportee to alert them that their leave has been approved. The reportee and the School/Service absence administrator will also receive an Outlook calendar appointment.

Not Authorised – will reject the leave request, and email the reportee to alert them to the status.

On Hold – changes the status of the task to ‘On Hold’. Whilst the task still remains in the ‘To do list’, it will only appear when the filter at the top of the list is changed to ‘On Hold’. For this reason we do not recommend using this option as outstanding tasks may be overlooked.

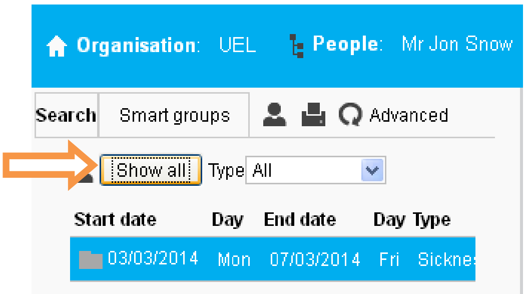
Alternatively you can click on the task itself, which will bring up the relevant holiday form. The advantage of opening the task completely is that the current holiday balances can also be viewed.

Should a reportee request leave which exceeds their holiday entitlement balance, an alert will appear in red on the task email, and a warning will appear on the task itself. The system will also display a negative holiday balance, but will not prevent the leave from being authorised.

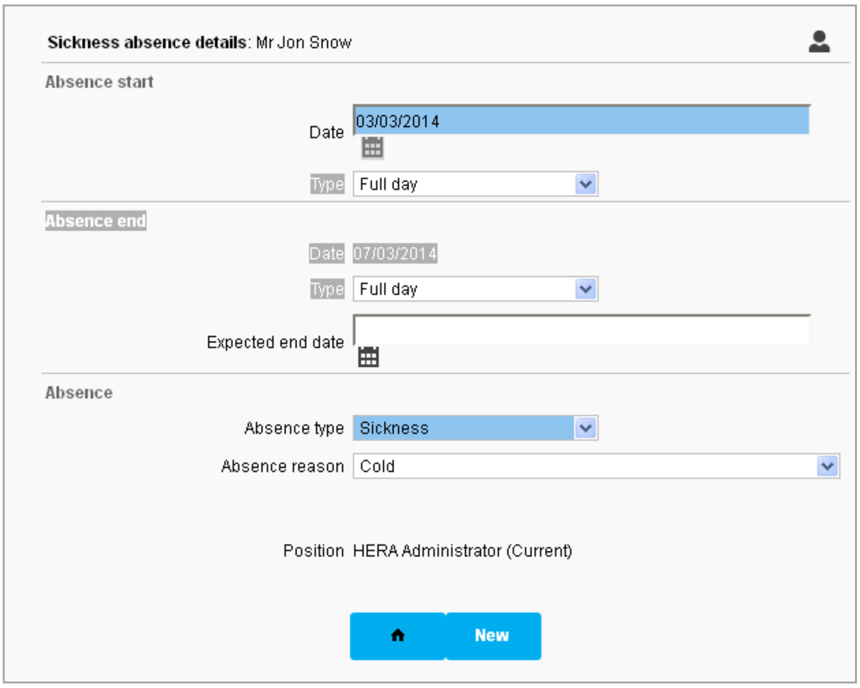
Once tasks have been actioned, they will disappear from the ‘To do list’.

5.0 Viewing Holiday and Sickness Details

As with other forms, click on the staff member you wish to view the details for, then the relevant form in the display panel. A list of recent absence dates will then appear in the object panel. To view older absences click on 'show all' button:



To view the details of the particular absence, click on the absence in the object panel and the details will appear on the right in the display panel.



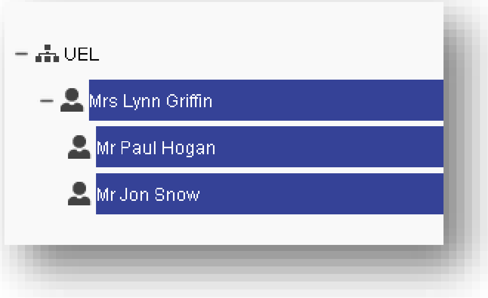
The holiday entitlement summary can be selected for a member of staff in a similar manner.

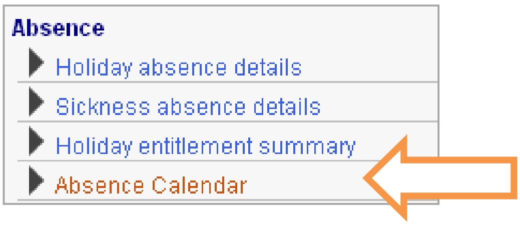
5.1 The Absence Calendar

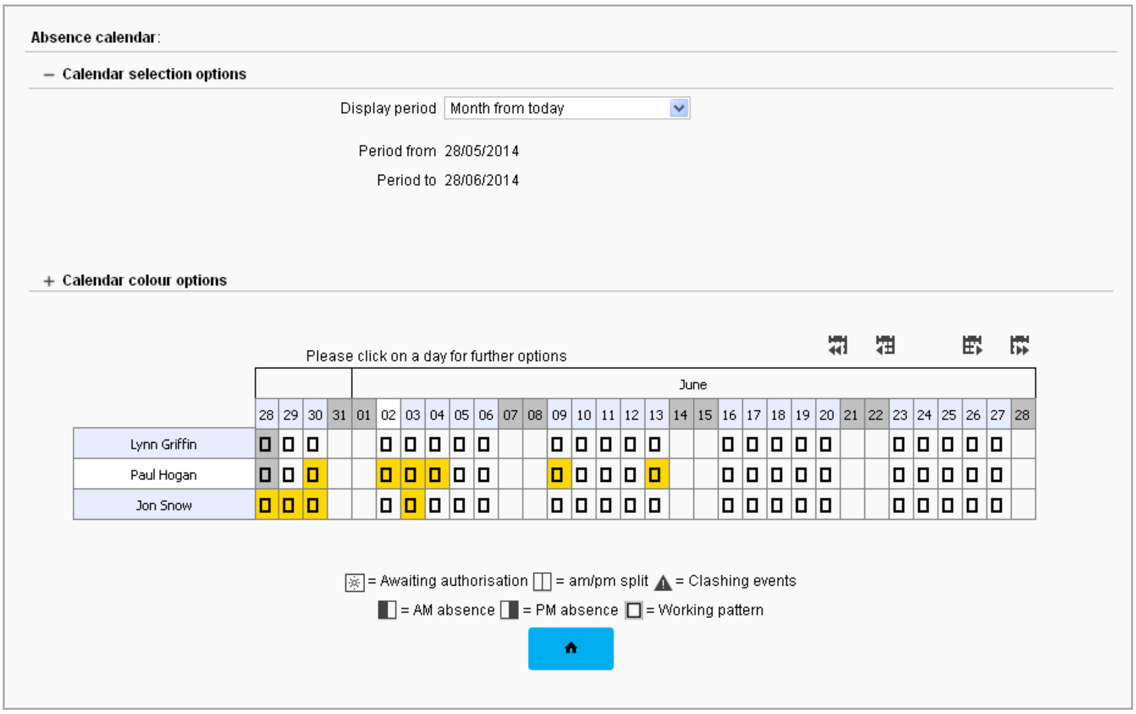
The absence calendar can be used to view an individual reportee, or multiple reportees.

The calendar can also be configured to show a specified date range for selected absence reasons.

To start, select the staff members which are required in the object panel (for multiple reportees hold down **Ctrl**) and then select the 'Absence Calendar' option from the links in the display panel.



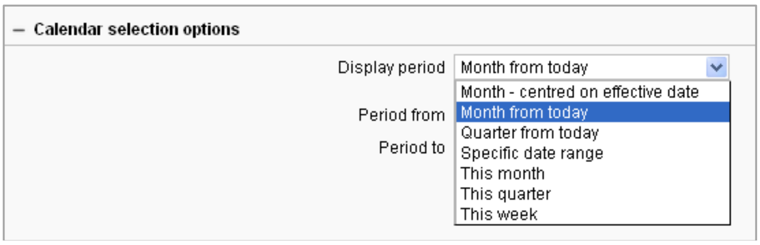




5.1.1 Calendar Date Selection options

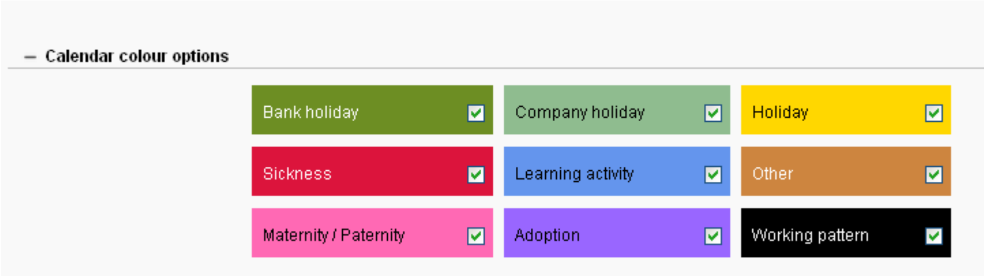
The date range can be defined by using the 'Display period' drop-down menu.

The menu provides a range of standard periods, such as 'Month from today' and 'This quarter', but you can also define the date range by using the 'Specific date range' option and entering the date range manually.



5.1.2 Calendar Colour Options

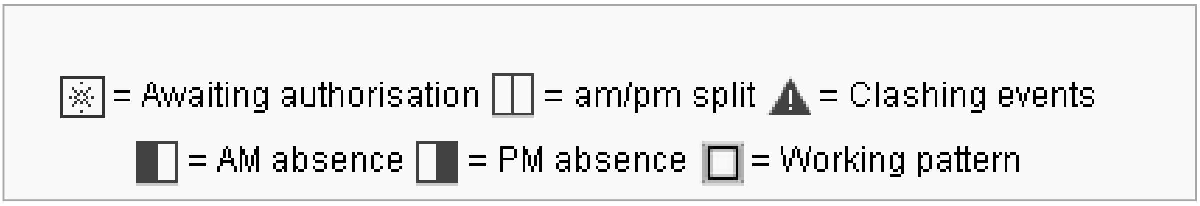
By expanding the 'Calendar colour options' section, you will also be able to view a key to the absence types which are displayed. This key also allows you to toggle the types of absences displayed on and off. This is simply achieved by ticking and un-ticking the check box for each absence type.



5.1.3 Calendar Display Period buttons

	Go back 3 months	The display is extended to include the previous 3 months
	Go back 1 month	The display is extended to include the previous month
	Go forward 1 month	The display will be extended to include the following month.
	Go forward 3 months	The display will be extended to include the following 3 months.

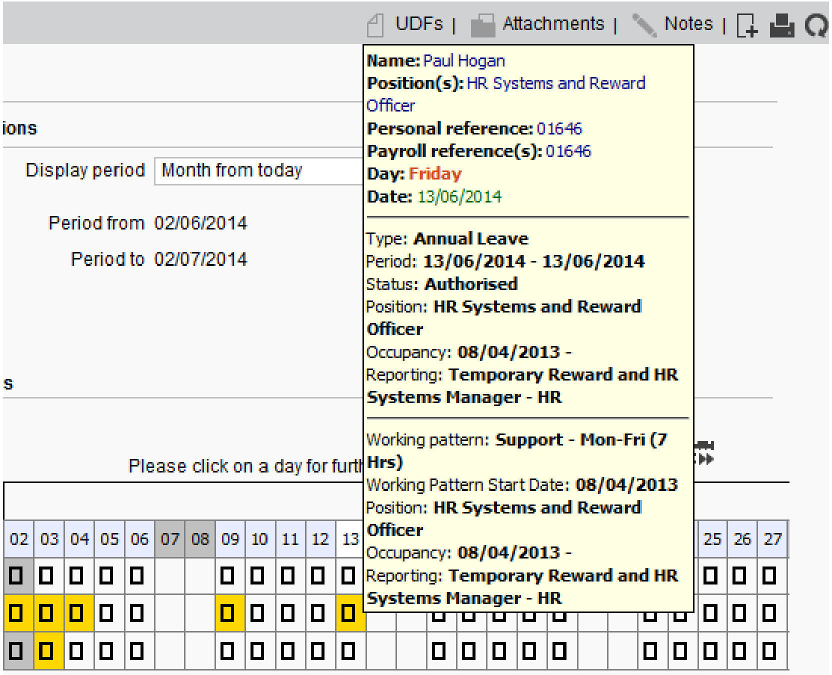
5.1.4 Absence Status Key



5.1.5 Calendar display

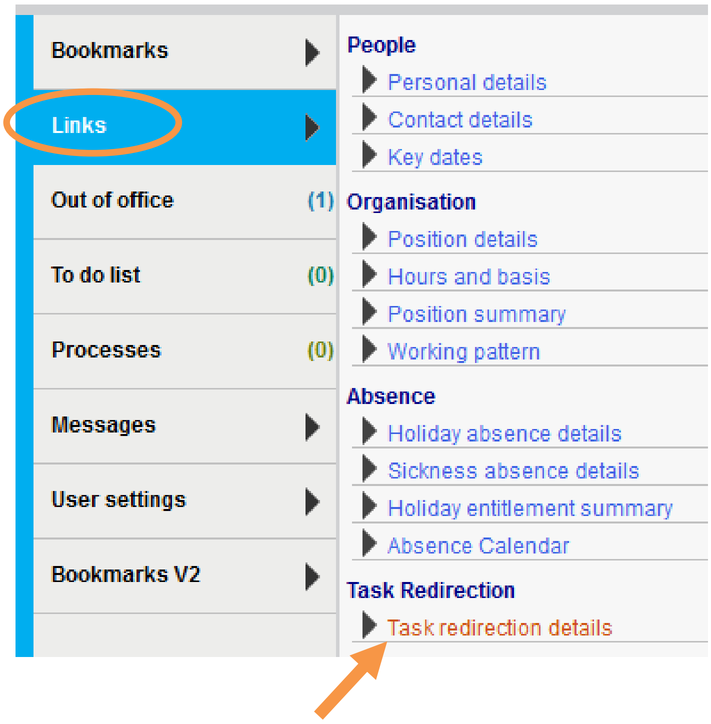
If you hover over the dates in the calendar, information about your reportees will display.

When the cursor is on a cell which has a recorded absence the pop up information box will display basic details about the employee, type of absence, reporting manger and working pattern.



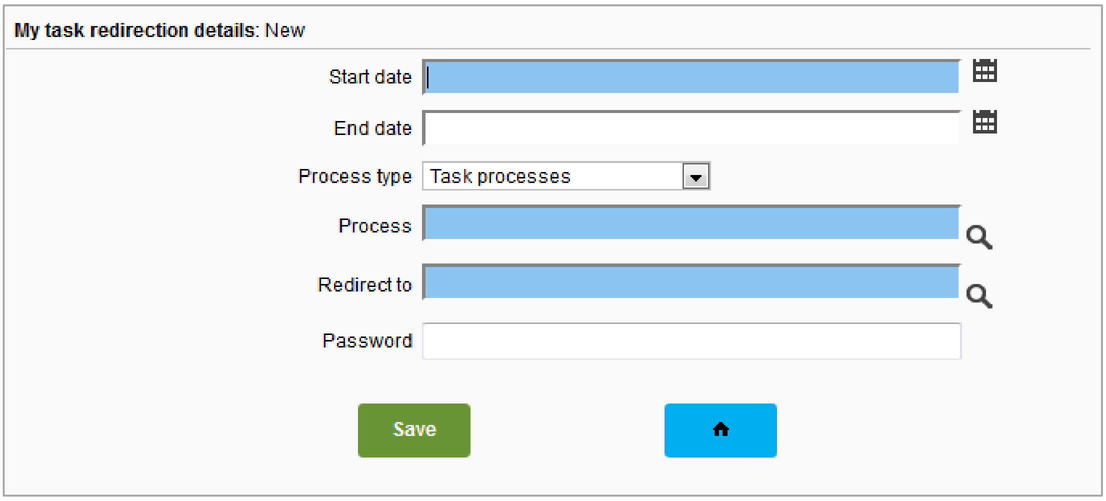
6.0 Task Redirection

If you are taking annual leave, or out of the office for significant periods of time, can redirect some, or all of your tasks to another member of staff who also uses People Manager.



To redirect your tasks, access the 'Task Redirection details' form via the Links section of the homepage.

If you wish to redirect both tasks,(Holiday Approval and Holiday Amendment) a rule will need to be set up for each (recommended).



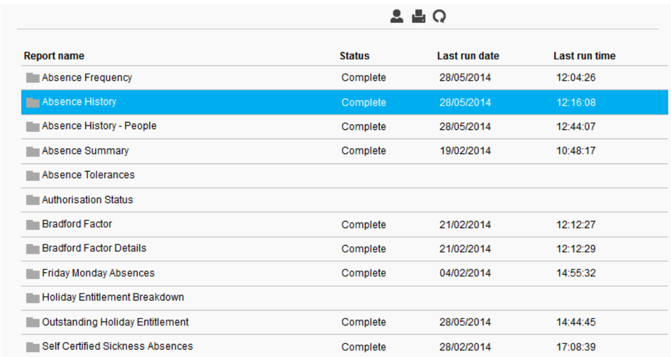
a) Enter **Start Date**
b) Enter **End date** (recommended if known it will then not be necessary to remember to turn off the task redirection on your return.
c) Select **Process Type** = Task Process
d) Search for **Process** by clicking on the search magnifying glass
e) In the search box type in ho(liday), select search and select either Holiday Approval or Holiday Amandement)
f) **Redirect to** - Select your assigned People Manager to approve your reportees leave in your absence using the search Magnifying glass
g) Enter your UEL **Password** and select S**ave**

7.0 Reporting

People Manager includes a reporting facility with a suite of management reports grouped into the areas Absence, People, and Structure. These can be found at the bottom of the Links area on the homepage.

Each report has different parameters which can be defined to filter the data that is returned by the database. **All reports will only return data for your reportees.**

As an example, the steps required to run an absence report are detailed below.



Report name	Status	Last run date	Last run time
Absence Frequency	Complete	28/05/2014	12:04:26
Absence History	Complete	28/05/2014	12:16:08
Absence History - People	Complete	28/05/2014	12:44:07
Absence Summary	Complete	19/02/2014	10:48:17
Absence Tolerances			
Authorisation Status			
Bradford Factor	Complete	21/02/2014	12:12:27
Bradford Factor Details	Complete	21/02/2014	12:12:29
Friday Monday Absences	Complete	04/02/2014	14:55:32
Holiday Entitlement Breakdown			
Outstanding Holiday Entitlement	Complete	28/05/2014	14:44:45
Self Certified Sickness Absences	Complete	28/02/2014	17:08:39

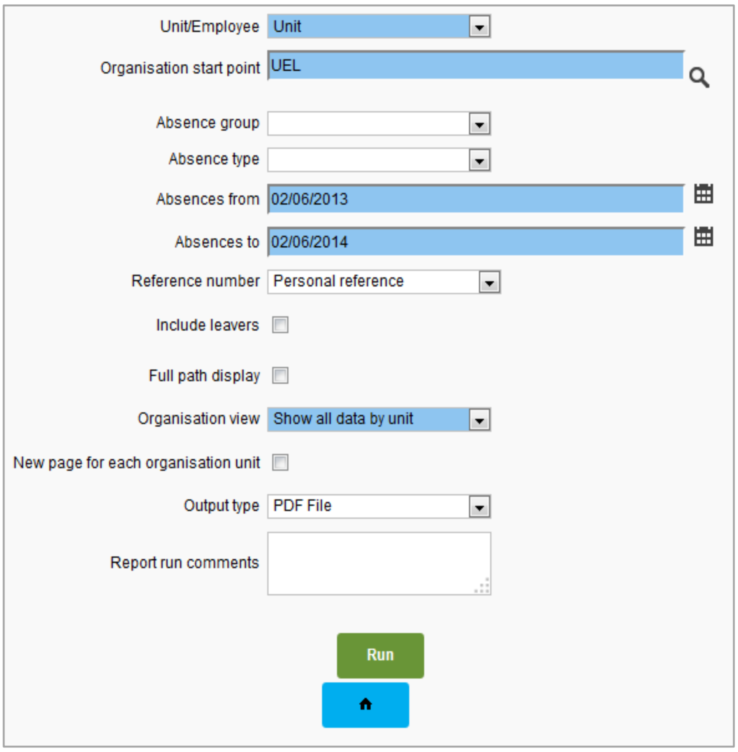
Access the Links on the homepage, and select a report group from the list of groups which is available **(Absence/People/Structure).**

A list of reports for the group will now appear in the object panel (see left).

Select the report which is required. In this example we are using the Absence History report.

7.1 Report Parameters

Once the report has been selected, the parameters which can be defined will appear in the display panel (see below).



Unit/Employee – this automatically defaults to 'Unit'. To report on an individual, use the drop down menu to select 'Employee'.

Organisation start point – this will default to UEL, but **reporting security will automatically restrict the data returned in the report**. This means that you will only need to change this to report on a Sub Unit, or individual reportee. To enter data in this field click on the search magnifying glass.

Absence group – select absence group from the drop down list (Holiday, Maternity, Other, Sickness, Paternity, Adoption). 'Other' covers absence such as compassionate leave and jury service. This can be left blank to report on all types of absence.

Absence type – this can be left blank to report on all types of absence for the absence group, or used to select a sub group (e.g. reporting on the group 'Other' will return Jury Service and Compassionate Leave. If only Jury Service is required, it can be selected here.)

Absence from/to – enter the date ranges required by typing in the date, or select the dates from the calendar pop up .

Reference number – this will default to 'Personal reference'. These are identifiers used by HR Services, so will not need to be amended.

Include Leavers – leavers can be included in reports by ticking this box. Information relating to ex-staff members will no longer be returned six weeks after they have left or transferred to a new reporting manager, as it will no longer be relevant.

Full path display – this will display the full organisational path for the reporting unit. E.g. If this is ticked, Payroll will display as 'HR Services/Payroll', rather than 'Payroll'. This may be useful for areas with more complex structures.

Organisation view – this will automatically default to 'Show all data by unit'. This shows all staff in the chosen unit and sub units, grouped by their sub unit. There are two other options:

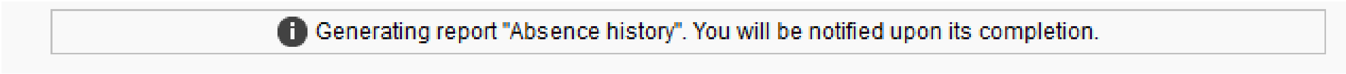
'Show all data as top unit' will include all staff in the unit and sub units, but the information will not be grouped by sub unit headers.

'Only include data in top unit' will exclude information for staff in any sub units, and return the information for the chosen unit only.

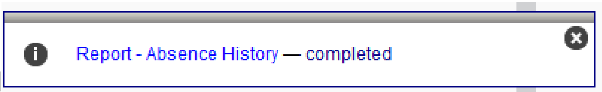
New page for each organisation unit – ticking this box will create a page break at the end of the information for each unit.

Output type – this will default to 'PDF file'. The PDF file is formatted to be easier to read, and is recommended unless the data needs to be manipulated for statistics. For creating charts and tables using the data, select the 'CSV File' option. The data can then be easily imported into a spreadsheet.
Report run comments – this is for personal reference and is a free text box.

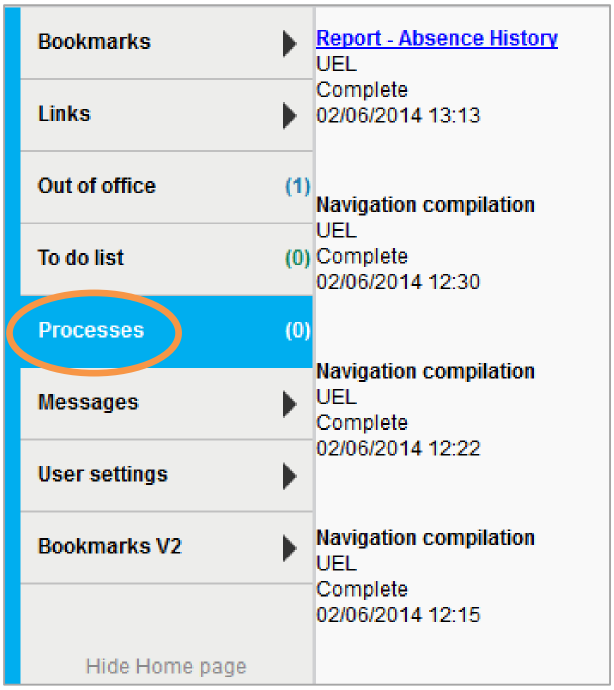
Select **Run,** a message will appear, informing you that the report is generating.



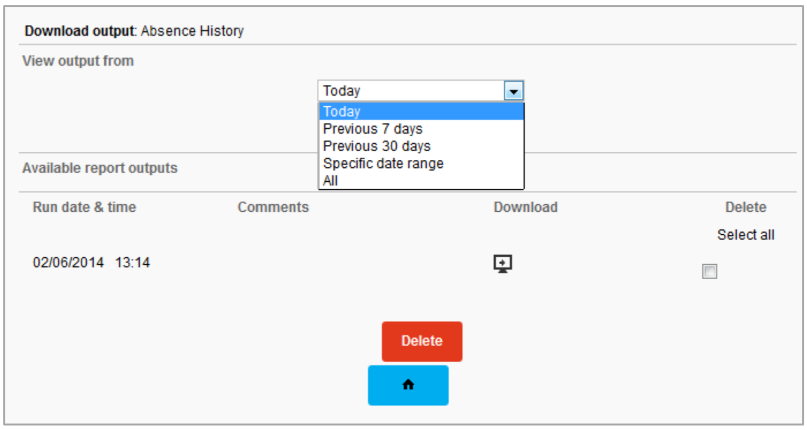
A message will pop up when the report is ready for download



Reports can be retrieved from the Process Section, recent reports will display in the Processes section



You can view the Absence History report you ran today or previous occasions. It is recommended that you make local copies of reports, as the server will be regularly cleared down.



Click on the download  button and the report either in CSV or PDF will download to your device